

# FSSA Technology Services

## Software Update Release Notes

FSSA Technology Services has released a software update to the following product:

### **Crisis**

This Release Notes document provides brief descriptions of the changes that occurred to this product as a result of the update. More information about these changes will be added to the *Crisis User Guide* in the CORM document library on the DDRS SharePoint website.

This document provides sections for the following update changes:

1. Change Workflow When Opening a New Episode
2. Change Workflow When Adding a New Service
3. Change Menu Items
4. Record Episode Closure Information
5. Include Field Service Directors in Initial Crisis Email

## **1.0 Change Workflow When Opening a New Episode**

Previously, when you opened a new Crisis episode, the system displayed the **Select a Service Description** window followed by the **Call Information** window. After you completed the information in these windows, the system architecture required that you use the **Service** menu to change other information for the initial service.

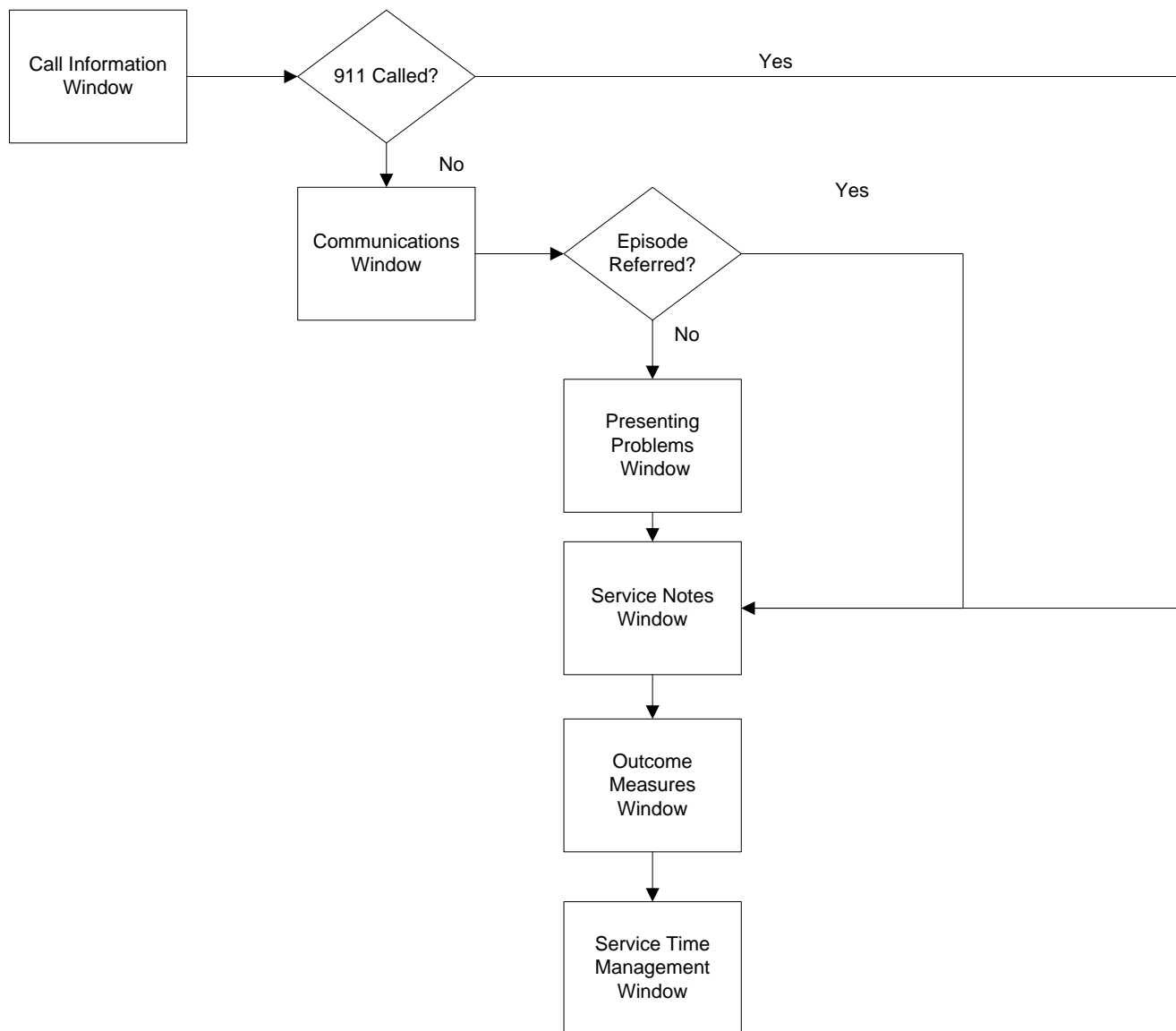
Now, when you open a new Crisis episode, the system selects the 24 Hour Support service type and uses a workflow that presents the following series of windows, queries, and dialog boxes to obtain as much information as possible about the initial call:

- **Call Information** window
- **911 Called?** (Internal query)
- **Communications** window
- **Episode Referred?** dialog box
- **Presenting Problems** window
- **Service Notes** window
- **Outcome Measures** window
- **Service Time Management** window

## 1.1 New Episode Workflow

The following illustration shows a diagram of the New Episode workflow:

### New Episode Workflow



## 1.2 Call Information Window

This update adds, removes, and changes the location of some of the fields in the **Call Information** window. Additionally, the following fields in the **Call Information** section of the window are required before the workflow will display the next window:

- **Caller Last Name**
- **Caller First Name**
- **Phone Number**
- **Initial Residential Setting**

The following illustration shows an example of the new **Call Information** window:

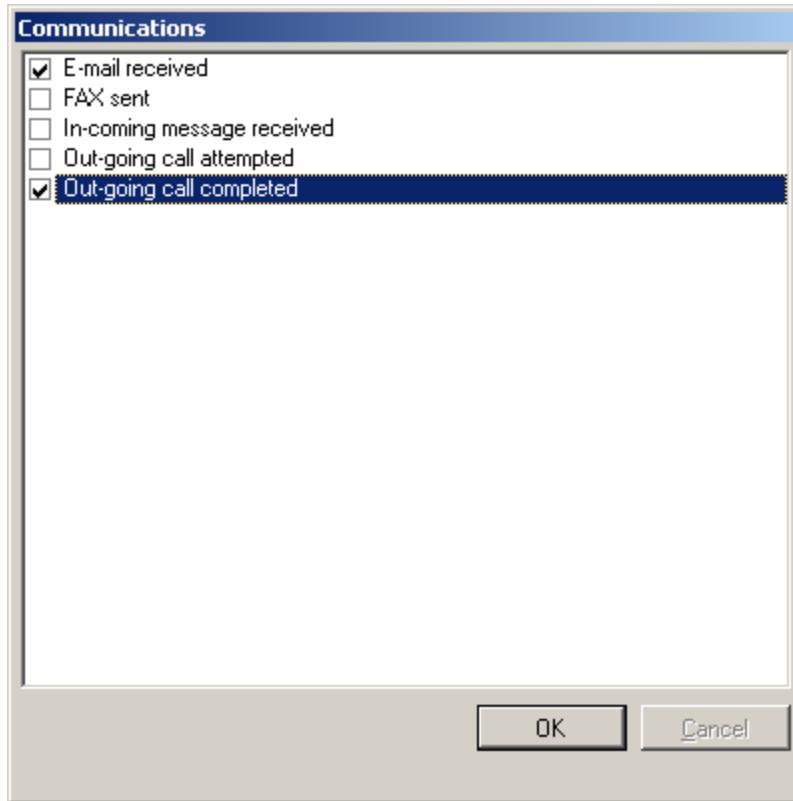
The screenshot displays the 'Call Information' window, which is divided into three main sections: 'Call Information', 'Immediate Danger', and 'Referral Information'. The 'Call Information' section contains fields for 'Caller Last Name' (Jones), 'Caller First Name' (Bobby), 'Phone Number' (317-555-1234), and 'Initial Residential Setting' (Adult Foster Care (AFA)). The 'Immediate Danger' section includes a '911 Called By' section with radio buttons for 'Self', 'Guardian', and 'Support Center', and several text fields for 'Agency Type', 'Agency Name', 'Agency Contact', 'Contact Phone Number', 'Who is in danger', 'What is the danger', and 'Indications'. The 'Referral Information' section contains fields for 'Source Of Referral' (Advocate), 'Company' (Provider), 'Address', 'City', 'State' (IN), 'Zip Code', 'Contact Phone', 'FAX', 'Email', 'Relationship' (Advocate), and 'Enter Company Name' (ABC PROVIDER, INC). At the bottom right, there are buttons for 'Search Provider', 'OK', and 'Cancel'.

## 1.3 911 Internal Query

If you complete the **911 Called By** section of the **Call Information** window, the workflow displays the **Service Notes** window, thus bypassing the **Communications**, **Presenting Problems**, and **Outcome Measures** windows.

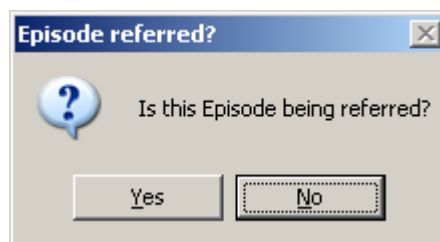
## 1.4 *Communications Window*

You use the **Communications** window to indicate the types of communication used for the service. While most initial Crisis services will result from a phone call received, other types of communication are available, as shown in the following illustration:



## 1.5 *Episode Referred? Dialog Box*

After you complete the **Communications** window, the system displays the **Episode Referred?** dialog box to determine whether the new episode is being created to address a referral issue (which should be handled by a means other than in the Crisis product). The following illustration shows the **Episode Referred?** dialog box:

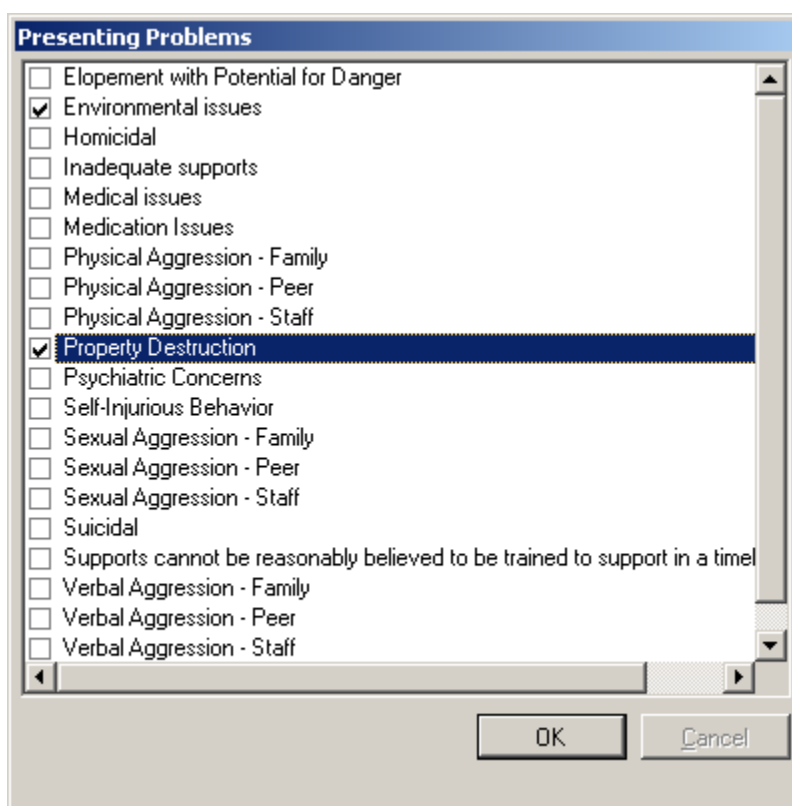


Selecting **Yes** indicates a referral episode. The system displays the **Service Notes** window, followed by the **Service Time Management** window, so that you can promptly add a note and record the time spent on the episode to prepare the episode for closure by a manager.

Selecting **No** indicates that the episode is Crisis related, and the next window in the sequence, **Presenting Problems**, appears.

## 1.6 *Presenting Problems Window*

You use the **Presenting Problems** window to indicate the issues that the consumer experienced to prompt the Crisis call. You can select multiple problems, as shown in the following illustration:

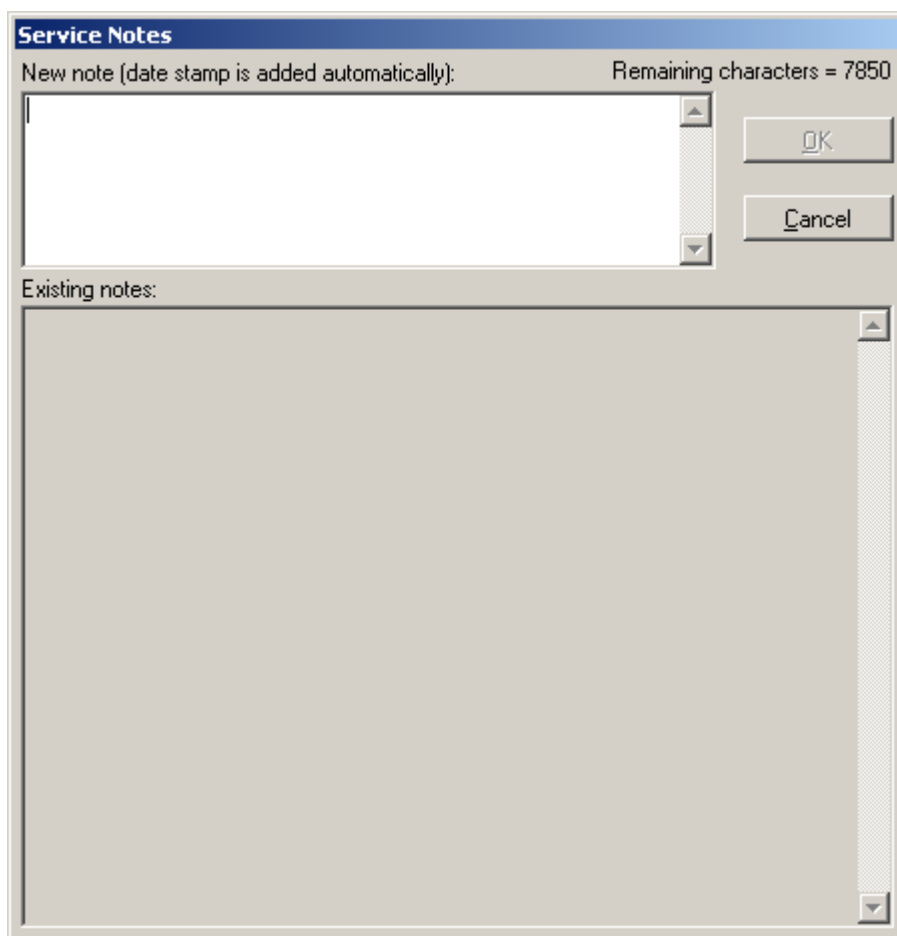


## 1.7 *Service Notes Window*

The workflow automatically displays the **Service Notes** window after one of the following events occurs:

- You complete the **Call Information** window with a **911 Called By** radio button selected.
- You select **Yes** in the **Episode Referred?** dialog box.
- You complete the **Presenting Problems** window.

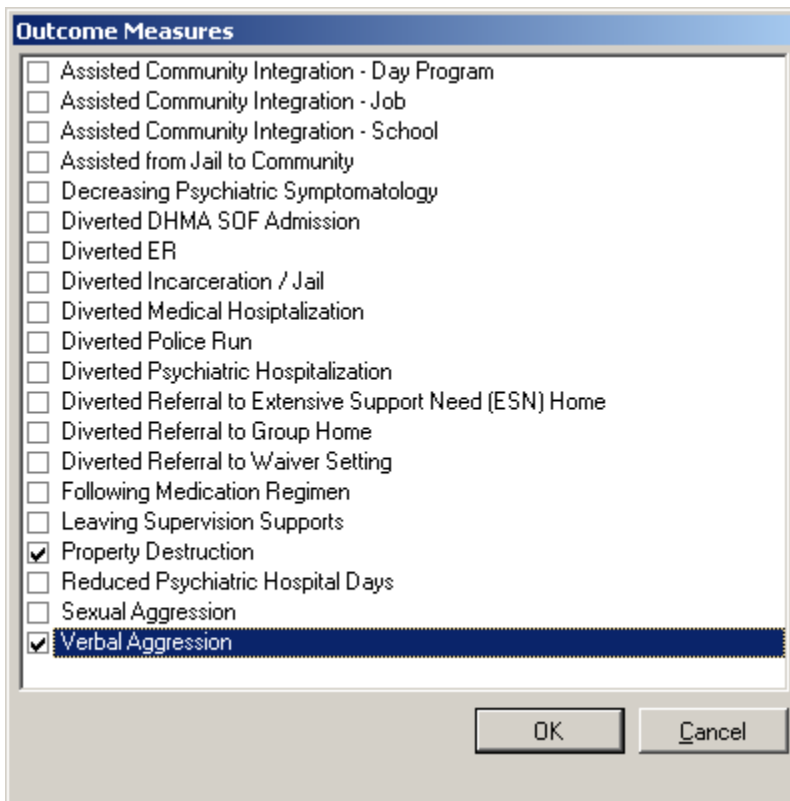
No changes have occurred to the **Service Notes** window - it is presented in the following illustration for continuity:



The screenshot shows a window titled "Service Notes". At the top, there is a blue header bar with the title. Below the header, the window is divided into two main sections. The top section is for "New note (date stamp is added automatically):" and includes a text input field with a vertical scrollbar on the right. To the right of the input field, it says "Remaining characters = 7850". Below the input field are two buttons: "OK" and "Cancel". The bottom section is labeled "Existing notes:" and contains a large, empty rectangular area with a vertical scrollbar on the right side, intended for a list of previous notes.

## 1.8 Outcome Measures Window

You use the **Outcome Measures** window to indicate the outcome of the situation that prompted the initial Crisis call. As shown in the following illustration, you can select multiple outcomes:



The screenshot shows a window titled "Outcome Measures" with a list of 20 outcomes, each preceded by a checkbox. The "Verbal Aggression" checkbox at the bottom is checked and highlighted with a blue background. The "Property Destruction" checkbox is also checked. The other checkboxes are unchecked. At the bottom right of the window are "OK" and "Cancel" buttons.

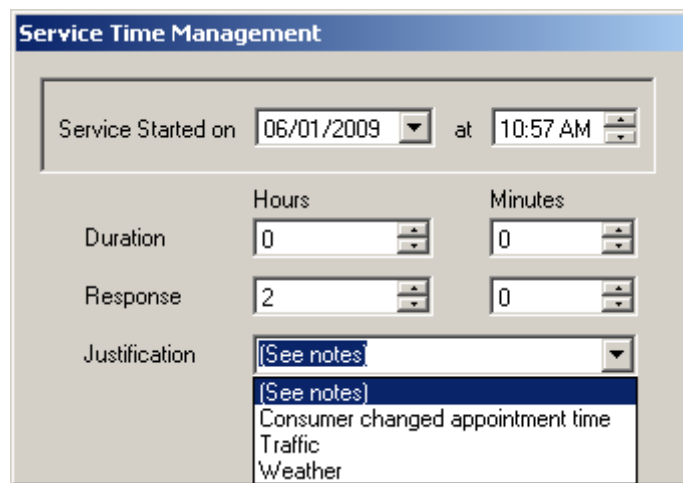
Outcome Measure	Selected
<input type="checkbox"/> Assisted Community Integration - Day Program	No
<input type="checkbox"/> Assisted Community Integration - Job	No
<input type="checkbox"/> Assisted Community Integration - School	No
<input type="checkbox"/> Assisted from Jail to Community	No
<input type="checkbox"/> Decreasing Psychiatric Symptomatology	No
<input type="checkbox"/> Diverted DHMA SOF Admission	No
<input type="checkbox"/> Diverted ER	No
<input type="checkbox"/> Diverted Incarceration / Jail	No
<input type="checkbox"/> Diverted Medical Hospitalization	No
<input type="checkbox"/> Diverted Police Run	No
<input type="checkbox"/> Diverted Psychiatric Hospitalization	No
<input type="checkbox"/> Diverted Referral to Extensive Support Need (ESN) Home	No
<input type="checkbox"/> Diverted Referral to Group Home	No
<input type="checkbox"/> Diverted Referral to Waiver Setting	No
<input type="checkbox"/> Following Medication Regimen	No
<input type="checkbox"/> Leaving Supervision Supports	No
<input checked="" type="checkbox"/> Property Destruction	Yes
<input type="checkbox"/> Reduced Psychiatric Hospital Days	No
<input type="checkbox"/> Sexual Aggression	No
<input checked="" type="checkbox"/> Verbal Aggression	Yes

## 1.9 Service Time Management Window

The **Service Time Management** window is the last window to appear in the New Episode workflow. This window includes fields that you can use to set the:

- Date and time of the service
- Duration of the service
- Response time for the service
- Justification when the response time falls outside of contractual limits

The **Justification** field appears initially as inactive (grayed out), and becomes activated and required when you enter a time in the **Response** field that exceeds 30 minutes. The following illustration shows an example of the **Service Time Management** window, with the contents of the **Justification** drop-down field showing:



The screenshot shows the 'Service Time Management' window. It contains the following fields:

- Service Started on:** A date field set to '06/01/2009' and a time field set to '10:57 AM'.
- Duration:** Two spinners for 'Hours' (set to 0) and 'Minutes' (set to 0).
- Response:** Two spinners for 'Hours' (set to 2) and 'Minutes' (set to 0).
- Justification:** A drop-down menu currently showing '[See notes]'. The expanded list includes: '[See notes]', 'Consumer changed appointment time', 'Traffic', and 'Weather'.



## 2.0 Change Workflow When Adding a New Service

Previously, when you added a new Crisis service, the system displayed the **Select a Service Description** window. After you selected the service description, the system architecture required that you use the **Service** menu to add or change the other information for the service.

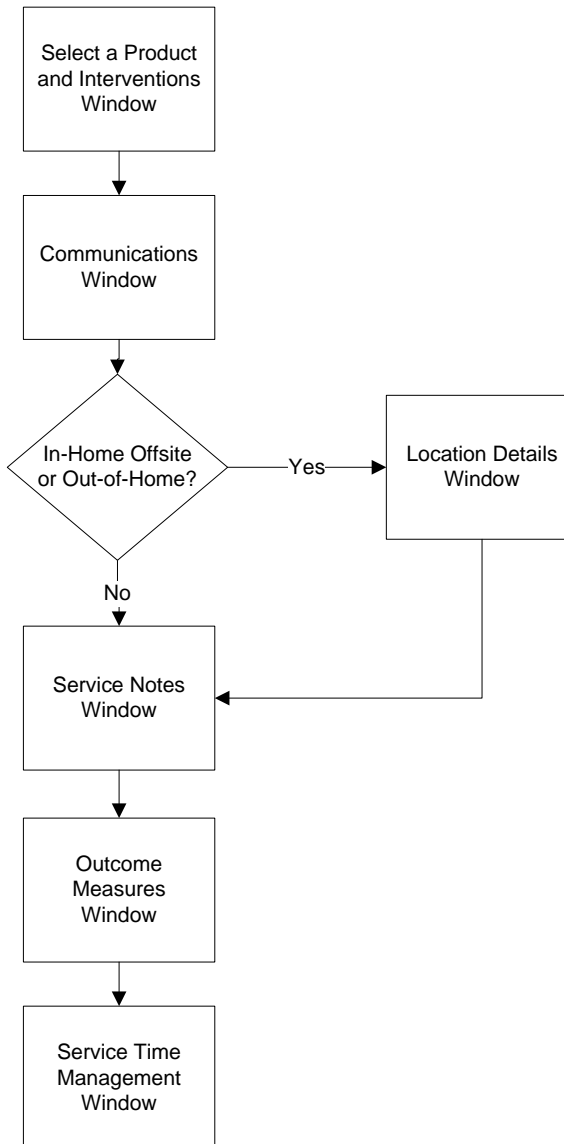
Now, when you add a new Crisis service, the system displays the **Select a Product and Interventions** window and uses a workflow that presents the following series of windows and queries to obtain additional information about the service:

- **Communications** window
- **In-Home Off-Site or Out-of-Home service type?** (Internal query)
- **In-home Off-Site or Out-of-Home Location Details** window
- **Service Notes** window
- **Outcome Measures** window
- **Service Time Management** window

## 2.1 *New Service Workflow*

The following illustration shows a diagram of the New Service workflow:

### New Service Workflow



## 2.2 *Select a Product and Interventions Window*

With this update, the **Select a Product and Interventions** window replaces the **Select a Service Description** window when you add a new service to an episode. You use the **Select a Product and Interventions** window to select one product and one or more interventions for the service. The following illustration shows an example of the **Select a Service Description** window:

**Select a Product and Interventions**

Product: Consultation

☐ Off-site

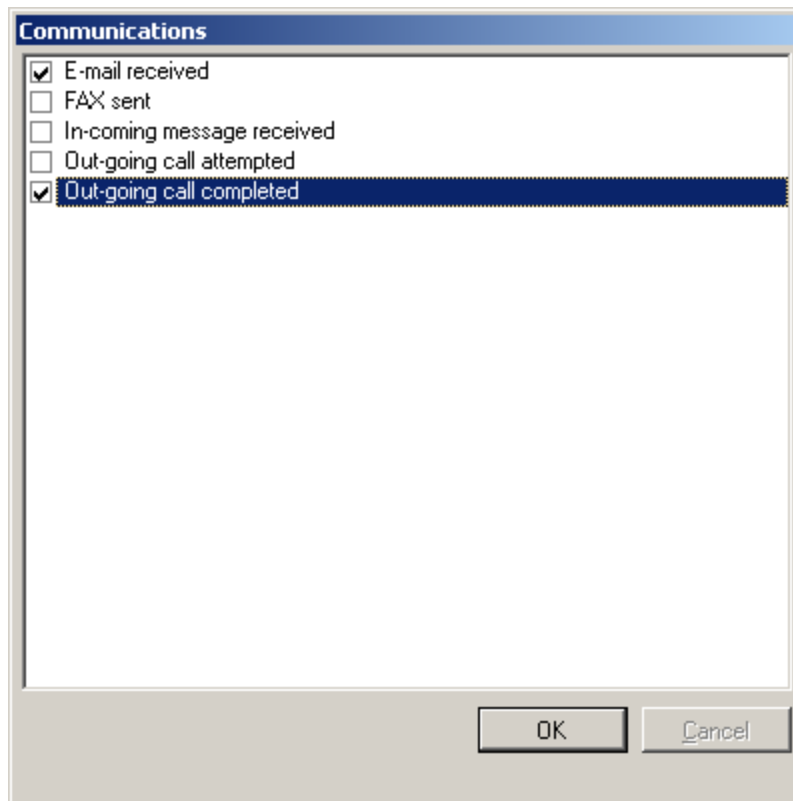
Interventions:

- ☐ BDDS staff
- ☐ Community behavioral clinician
- ☐ Community medical personnel
- ☐ Community psychiatrist
- ☐ Consumer
- ☐ Crisis management team
- ☐ Crisis psychiatrist
- ☐ Family
- ☐ Guardian
- ☐ IPMG case manager
- ☐ Outreach Discipline
- ☐ Residential staff
- ☐ Respite staff
- ☐ Teacher / school staff

OK Cancel

## 2.3 Communications Window

The **Communications** window appears after you complete the **Select a Product and Interventions** window. You use the **Communication** window to indicate the types of communication used for the service. The following illustration shows an example of the **Communications** window:

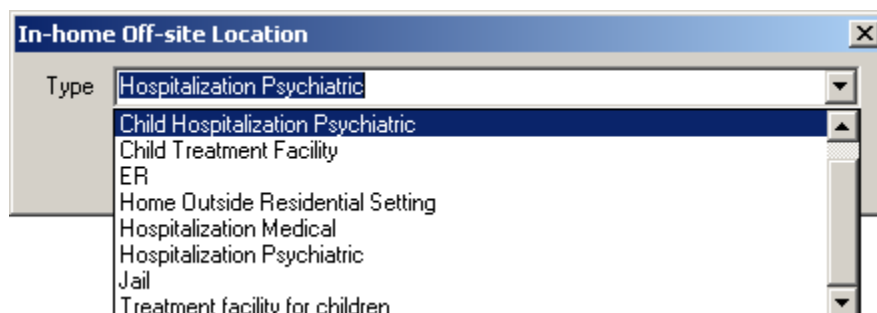


The screenshot shows a window titled "Communications". Inside, there is a list of communication types, each with a checkbox. The "Out-going call completed" option is selected and highlighted. At the bottom right, there are "OK" and "Cancel" buttons.

Communication Type	Selected
E-mail received	<input checked="" type="checkbox"/>
FAX sent	<input type="checkbox"/>
In-coming message received	<input type="checkbox"/>
Out-going call attempted	<input type="checkbox"/>
Out-going call completed	<input checked="" type="checkbox"/>

## 2.4 In-Home Off-Site Location Window

The **In-Home Off-Site Location** window appears after you complete the **Communication** window for an In-Home Off-Site service type. You use this window to indicate where the consumer was when the service was administered. The following illustration shows an example of the **In-Home Off-Site Location** window:

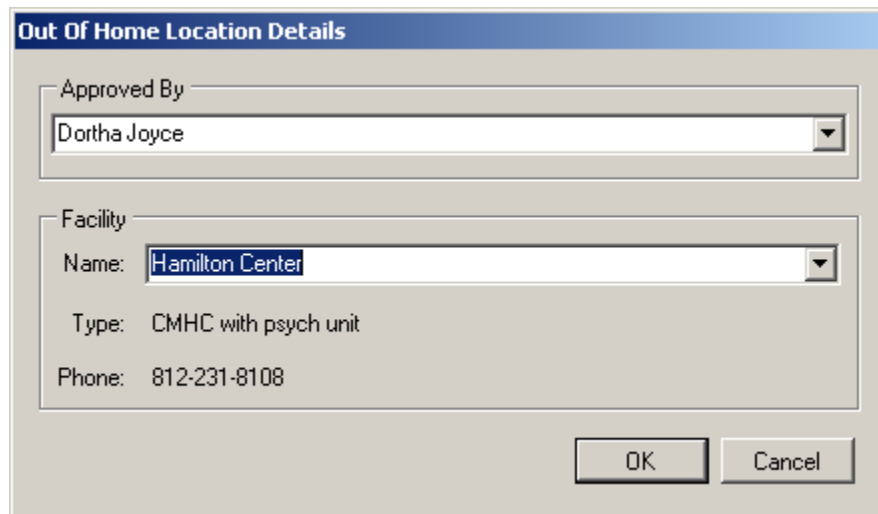


The screenshot shows a window titled "In-home Off-site Location". It features a list box with a "Type" label on the left. The list contains several location types, with "Child Hospitalization Psychiatric" currently selected and highlighted. The list is scrollable, as indicated by the vertical scrollbar on the right.

Type
Hospitalization Psychiatric
Child Hospitalization Psychiatric
Child Treatment Facility
ER
Home Outside Residential Setting
Hospitalization Medical
Hospitalization Psychiatric
Jail
Treatment facility for children

## 2.5 Out-of-Home Location Details Window

The **Out-of-Home Location Details** window appears after you complete the **Communications** window for an Out-Of-Home service type. You use this window to indicate who approved the out-of-home placement and basic information about the placement facility. The following illustration shows an example of the **Out-of-Home Location Details** window:



The screenshot shows a window titled "Out Of Home Location Details". It contains two main sections. The first section, labeled "Approved By", has a dropdown menu with "Dortha Joyce" selected. The second section, labeled "Facility", contains a "Name:" label followed by a dropdown menu with "Hamilton Center" selected. Below the name field, there are two labels: "Type:" followed by "CMHC with psych unit" and "Phone:" followed by "812-231-8108". At the bottom right of the window are "OK" and "Cancel" buttons.

Valid entries for the **Approved By** field are:

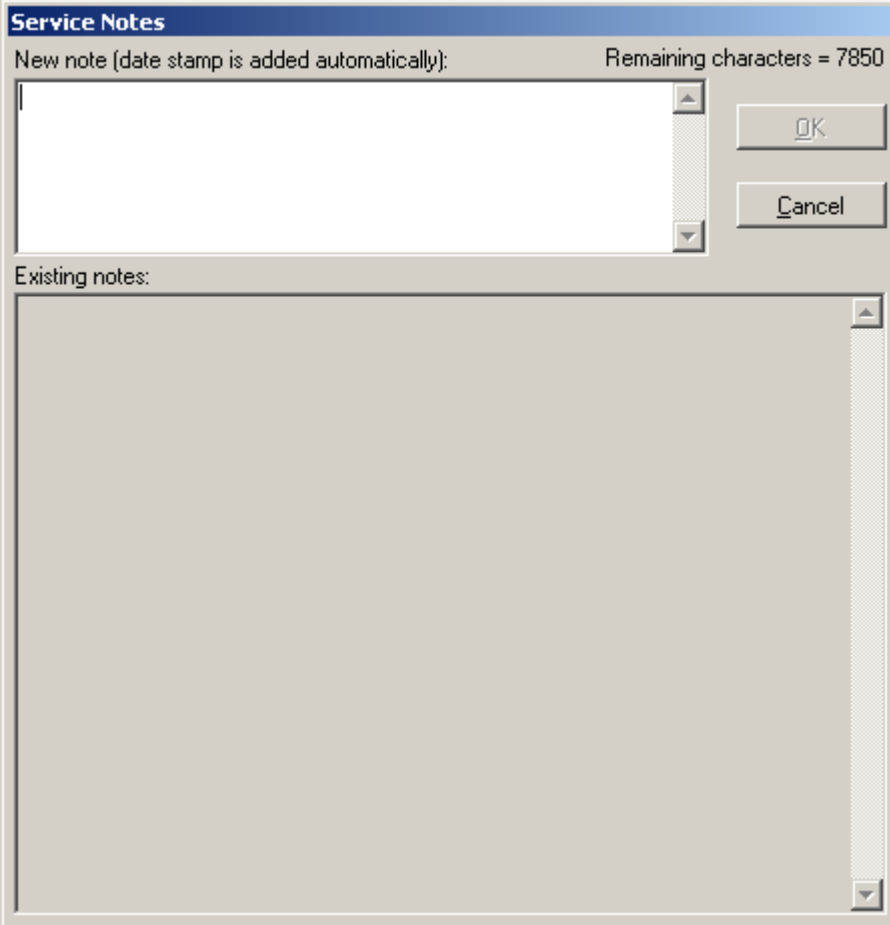
- **Randy Kriebel**
- **Dortha Joyce**
- **Susan Morris**
- **Jeanette Siener**
- **Mary Ann Ruppert**
- **Kellie Calita**
- **Becky Selig**

## 2.6 *Service Notes Window*

The workflow automatically displays the **Service Notes** window after one of the following events occurs:

- You complete the **Communications** window for a 24 Hour Support or Follow-Along service type.
- You complete the **In-Home Off-Site Location** window.
- You complete the **Out of Home Location Details** window.

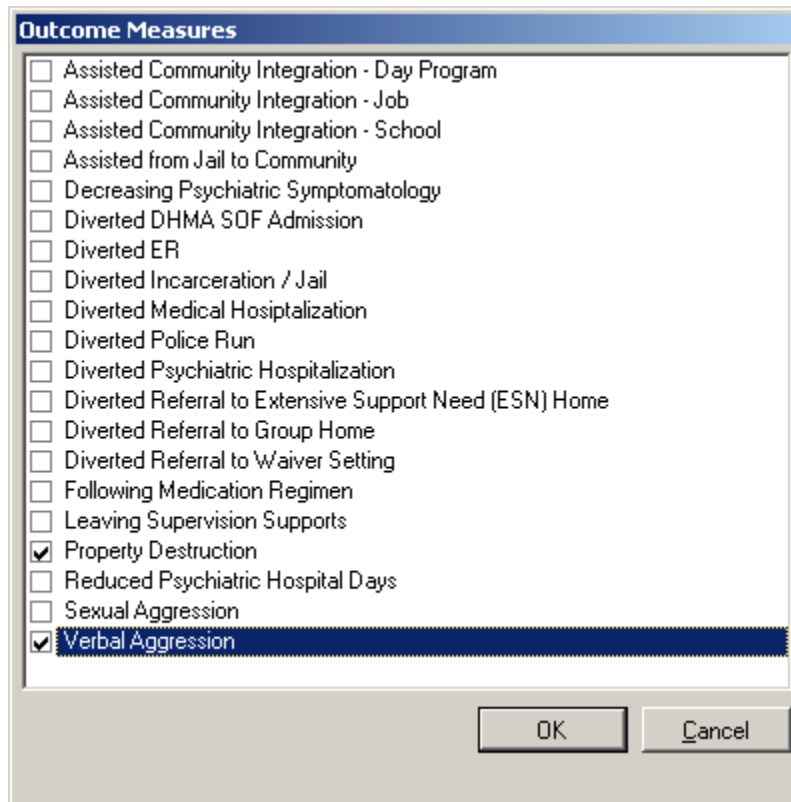
No changes have occurred to the **Service Notes** window - it is presented in the following illustration for continuity:



The screenshot shows a window titled "Service Notes". At the top, there is a status bar with the text "New note (date stamp is added automatically):" on the left and "Remaining characters = 7850" on the right. Below this is a large text input field for a new note, with a vertical scrollbar on its right side. To the right of the input field are two buttons: "OK" and "Cancel". Below the input field is a section labeled "Existing notes:" followed by a large, empty rectangular area with a vertical scrollbar on its right side, intended for a list of previous notes.

## 2.7 Outcome Measures Window

The **Outcome Measures** window appears after you complete the previous windows. You use this window to indicate the outcome of a service. You can select one or more outcomes, as shown in the following illustration:

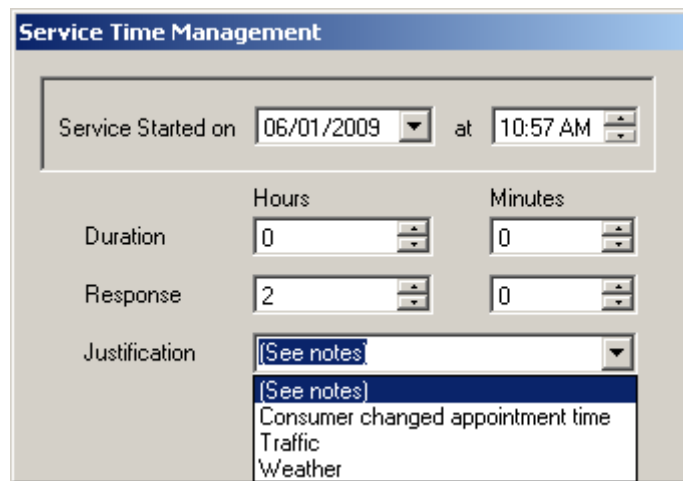


The screenshot shows a window titled "Outcome Measures" with a list of 20 outcomes, each preceded by a checkbox. The "Verbal Aggression" item at the bottom is highlighted with a blue background and has its checkbox checked. The "Property Destruction" item above it also has its checkbox checked. All other checkboxes are unchecked. At the bottom right of the window are "OK" and "Cancel" buttons.

Outcome Measure	Selected
<input type="checkbox"/> Assisted Community Integration - Day Program	No
<input type="checkbox"/> Assisted Community Integration - Job	No
<input type="checkbox"/> Assisted Community Integration - School	No
<input type="checkbox"/> Assisted from Jail to Community	No
<input type="checkbox"/> Decreasing Psychiatric Symptomatology	No
<input type="checkbox"/> Diverted DHMA SOF Admission	No
<input type="checkbox"/> Diverted ER	No
<input type="checkbox"/> Diverted Incarceration / Jail	No
<input type="checkbox"/> Diverted Medical Hospitalization	No
<input type="checkbox"/> Diverted Police Run	No
<input type="checkbox"/> Diverted Psychiatric Hospitalization	No
<input type="checkbox"/> Diverted Referral to Extensive Support Need (ESN) Home	No
<input type="checkbox"/> Diverted Referral to Group Home	No
<input type="checkbox"/> Diverted Referral to Waiver Setting	No
<input type="checkbox"/> Following Medication Regimen	No
<input type="checkbox"/> Leaving Supervision Supports	No
<input checked="" type="checkbox"/> Property Destruction	Yes
<input type="checkbox"/> Reduced Psychiatric Hospital Days	No
<input type="checkbox"/> Sexual Aggression	No
<input checked="" type="checkbox"/> Verbal Aggression	Yes

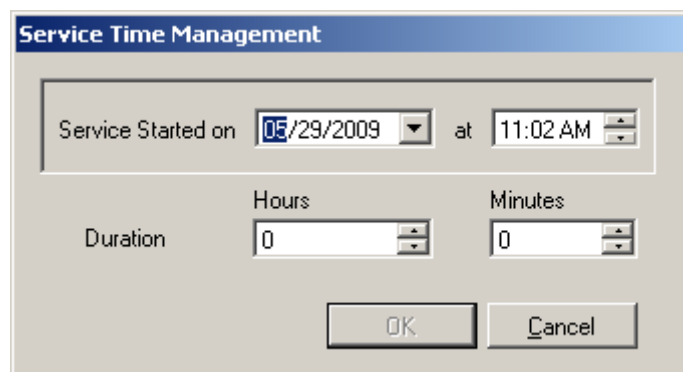
## 2.8 Service Time Management Window

After you add a note or cancel the **Service Notes** window, the system displays the **Service Time Management** window. You use this window to record the date and time of the service provided. For service types tied to contractual recording (for example, the first 24 Hour Support or In-Home service added for a consumer), the **Service Time Management** window includes fields for the response time of the service. A **Justification** field becomes active (and required) if the response time falls outside of the contractual timeframe, as shown in the following example:



The screenshot shows the 'Service Time Management' window. At the top, it says 'Service Started on' followed by a date dropdown set to '06/01/2009' and a time dropdown set to '10:57 AM'. Below this, there are two rows of input fields. The first row is labeled 'Duration' and has two spinners for 'Hours' (set to 0) and 'Minutes' (set to 0). The second row is labeled 'Response' and has two spinners for 'Hours' (set to 2) and 'Minutes' (set to 0). Below the 'Response' fields is a 'Justification' dropdown menu. The dropdown is open, showing the following options: '[See notes]', 'Consumer changed appointment time', 'Traffic', and 'Weather'.

For service types that are NOT tied to contractual recording (for example, subsequent 24 Hour Support services or Follow-Along services), the **Service Time Management** window omits the **Response** and **Justification** fields, as shown in the following illustration:

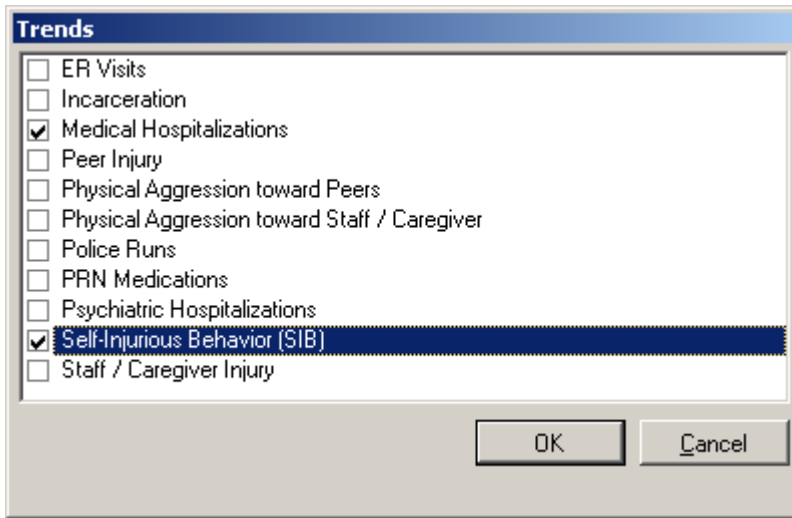


The screenshot shows the 'Service Time Management' window. At the top, it says 'Service Started on' followed by a date dropdown set to '05/29/2009' and a time dropdown set to '11:02 AM'. Below this, there are two rows of input fields. The first row is labeled 'Duration' and has two spinners for 'Hours' (set to 0) and 'Minutes' (set to 0). At the bottom of the window, there are two buttons: 'OK' and 'Cancel'.



### 3.0 Change Menu Items

In addition to the workflows that the system uses when you open a new episode or add a new service, this update changes many of the menus on the menu bar. The following table describes the changes that occurred to the menus, and also shows the menus that have not changed.

Menu	Changes
<b>Consumer</b>	Removed the following menu: <ul style="list-style-type: none"> <li>• <b>Report</b> – previously ran the <b>Consumer Episodes</b> report</li> </ul>
<b>Service</b>	Removed the following menu: <ul style="list-style-type: none"> <li>• <b>Description</b> – previously displayed the <b>Select a Service Description</b> window</li> </ul> <p>Added the following menus:</p> <ul style="list-style-type: none"> <li>• <b>Communications</b> – displays the <b>Communications</b> window</li> <li>• <b>Product/Interventions</b> – displays the <b>Select a Product and Interventions</b> window</li> <li>• <b>Location</b> – Displays the <b>In-Home Off-Site Location Details</b> window or the <b>Out-of-Home Location Details</b> window, as appropriate</li> <li>• <b>Outcome Measures</b> – displays the <b>Outcome Measures</b> window</li> </ul>
<b>Episode</b>	Added the following menus: <ul style="list-style-type: none"> <li>• <b>Presenting Problems</b> – displays the <b>Presenting Problems</b> window</li> <li>• <b>Trends</b> – displays the <b>Trends</b> window, which you can use to indicate one or more trends that have been recognized in the consumer, as shown in the following illustration:</li> </ul>  <p>The screenshot shows a window titled "Trends" with a list of trends and checkboxes. The trends listed are: ER Visits, Incarceration, Medical Hospitalizations (checked), Peer Injury, Physical Aggression toward Peers, Physical Aggression toward Staff / Caregiver, Police Runs, PRN Medications, Psychiatric Hospitalizations, Self-Injurious Behavior (SIB) (checked and highlighted), and Staff / Caregiver Injury. At the bottom of the window are "OK" and "Cancel" buttons.</p>

Menu	Changes
<b>Report</b>	Added the following menu: <ul style="list-style-type: none"> <li>• <b>Crisis Episode Notes</b> – runs the <b>Crisis Management Detail Report</b> that you can use to compile and print all of the service notes for a consumer.</li> </ul>
<b>View</b>	No changes
<b>Document</b>	No changes
<b>Help</b>	No changes

## 4.0 Record Episode Closure Information (Manager Function)

With this update, the system displays the **Episode Closure Information** window when a user with the Manager role closes an episode. The following illustration shows an example of this window:

**Episode Closure Information**

End Date: 06/03/2009

End Time: 08:19 AM

Initial Residential Setting: Own Home

Ending Residential Setting: [Empty Dropdown]

Number of days paid for by Crisis: 0

**Information and Referral**

- ☐ APS
- ☒ BDDS
- ☐ Behavioral Consultant
- ☐ CMHC
- ☐ CPS
- ☐ Family Practitioner
- ☐ IPMG/Case Manager
- ☐ Mental Health Services
- ☐ Outreach
- ☐ Physician Specialist

OK Cancel

## **5.0 Include Field Service Directors**

With this update, the system includes the Field Service Directors on the email that is sent when an initial 24 Hour Support call is received from a Crisis vendor. The system now includes individuals with the following position titles on the email:

- **Field Service Director**
- **District Manager**
- **Service Coordinator**